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Germany

Oilseeds and Products

Crop Estimate for Rapeseed and Sunflower 2003

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Report Highlights:

First estimates for the German 2003 rapeseed crop range from 3.35 to 3.7 million MT, compared to 3.85 million MT in 2002. The reduction is a result of winterkill, high summer temperatures and the current drought. The sunflower harvest will only start at the beginning of September. Currently a crop of 50,000 MT is forecast, about 40 percent less than expected earlier this year.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Berlin [GM1]
[GM]

Rapeseed

The German Federal Office of Statistics has issued a first preliminary crop estimate for rapeseed. The total rapeseed crop in Germany is estimated at 3.355 million MT, thereof 3.27 million MT of winter rapeseed and 85,000 MT of spring rapeseed. For total rapeseed this is a reduction of 13 percent compared to 2002. While the winter rapeseed crop declined by 14 percent, the summer rapeseed crop has more than doubled. The harvested area amounted to 1.27 million ha, 1.22 million ha and 49,500 ha for total rapeseed, winter rapeseed, and spring rapeseed, respectively.

However, the German Farmers' Union (*Deutscher Bauernverband, DBV*) expects total rapeseed crop at 3.5 to 3.7 million MT. These figures seem to reflect more current information, as the DBV's crop estimates are usually rather on the cautious side.

This big decline is in strong contrast to expectations of the fall of 2002, when rapeseed plantings reached a new record level of 1.33 million ha. However, during the Fall of 2002, a lack of rain in the North of Germany resulted in poor plant development before winter, while too much rain in the South facilitated the spread of a fungal disease (*Phoma lingam*). All in all, 5.8 percent of the rapeseed area had to be re-sown with summer rapeseed, sunflower or corn due to winterkill.

The drought and high temperatures further depressed the yield. When temperatures exceed 30 degrees Celcius (about 86 degrees Fahrenheit) rapeseed plants stop growing. A lack of rain can result in earlier maturation, which in turn leads to a lower yield as the plant has fewer days to produce dry matter.

The average yield declined by 11 percent from 29.7 MT/ha in 2002 to 26.4 MT/ha in 2003. The only two states, where yield was higher than in 2002, were Schleswig-Holstein and Lower Saxony. It comes as no surprise that those states border the North and/or the Baltic Sea and enjoyed lower temperatures and higher humidity than the rest of Germany in 2003. In contrast, Brandenburg with its sandy soils had to face the largest depression in yields. Details by state are shown in the table on page 3.

The lower availability of domestic rapeseed is expected to result in lower exports and higher imports of rapeseed and rapeseed oil, as demand for rapeseed oil is equally strong for food use as for the production of biodiesel.

Sunflower

The sunflower harvest starts only at the beginning of September. Therefore preliminary crop results are not available, yet. Estimates of industry sources concerning drought-related losses vary between 25 and 90 percent depending on the location. Post estimates the sunflower crop at 50,000 MT versus 80,000 MT expected earlier and 52,000 MT in 2002.

Statistics:

Table 1: German Area and Production of Rapeseed by State*

| State | 2002 final (1000 ha) | 2003 preliminary (1000 ha) | Change (in %) | 2002 final (million MT) | 2003 preliminary (million MT) | change (in %) |
|----------------------------|----------------------------|----------------------------------|------------------|-------------------------------|-------------------------------------|------------------|
| Mecklenburg-West Pomerania | 237.1 | 228.1 | -3.8 | 755.9 | 706.1 | -6.6 |
| Bavaria | 167.3 | 164.0 | -2.0 | 495.7 | 392.6 | -20.8 |
| Schleswig-Holstein | 104.6 | 100.6 | -3.8 | 334.6 | 357.1 | 6.7 |
| Saxony-Anhalt | 134.2 | 127.2 | -5.2 | 372.8 | 305.1 | -18.2 |
| Saxony | 123.5 | 118.2 | -4.3 | 350.0 | 280.5 | -19.9 |
| Thuringia | 113.0 | 108.4 | -4.1 | 332.4 | 268.5 | -19.2 |
| Lower Saxony | 96.6 | 92.9 | -3.8 | 259.2 | 259.4 | 0.1 |
| Brandenburg | 114.7 | 113.2 | -1.3 | 296.0 | 206.9 | -30.1 |
| Baden-Wuerttemberg | 70.4 | 68.8 | -2.3 | 222.8 | 185.2 | -16.9 |
| North Rhine-Westfalia | 50.0 | 55.1 | 10.2 | 157.1 | 158.1 | 0.6 |
| Hessia | 53.5 | 57.8 | 8.0 | 173.6 | 146.4 | -15.7 |
| Rhineland-Palatinate | 28.3 | 31.8 | 12.4 | 88.4 | 78.4 | -11.3 |
| Saarland | 3.0 | 3.9 | 30.0 | 8.9 | 8.7 | -2.2 |
| Total | 1,296.6 | 1,270.5 | -2.0 | 3,848.7 | 3,354.5 | -12.8 |

* ranked by production in 2003

Table 2: Rapeseed Yield per Hectar by State

| State | 2002 final (million MT) | 2003 first estimate (million MT) | change (in %) |
|----------------------------|----------------------------|--|------------------|
| Mecklenburg-West Pomerania | 31.9 | 31.0 | -2.8 |
| Bavaria | 29.6 | 23.9 | -19.3 |
| Schleswig-Holstein | 32.0 | 35.5 | 10.9 |
| Saxony-Anhalt | 27.8 | 24.0 | -13.7 |
| Saxony | 28.3 | 23.7 | -16.3 |
| Thuringia | 29.4 | 24.8 | -15.6 |
| Lower Saxony | 26.8 | 27.9 | 4.1 |
| Brandenburg | 25.8 | 18.3 | -29.1 |
| Baden-Wuerttemberg | 31.7 | 26.9 | -15.1 |
| North Rhine-Westfalia | 31.4 | 28.7 | -8.6 |
| Hessia | 32.4 | 25.3 | -21.9 |
| Rhineland-Palatinate | 31.3 | 24.7 | -21.1 |
| Saarland | 30.1 | 22.2 | -26.2 |
| Total | 29.7 | 26.4 | -11.1 |